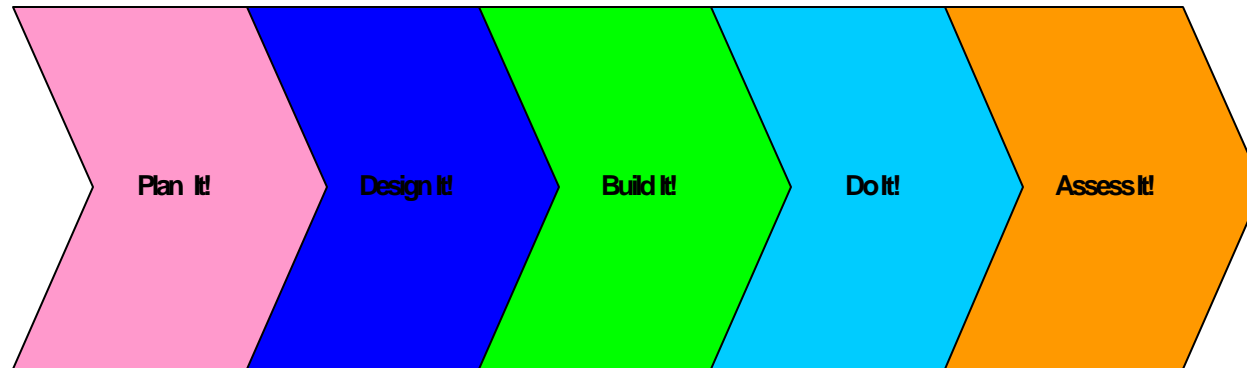


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Training Development Methodology



Purpose

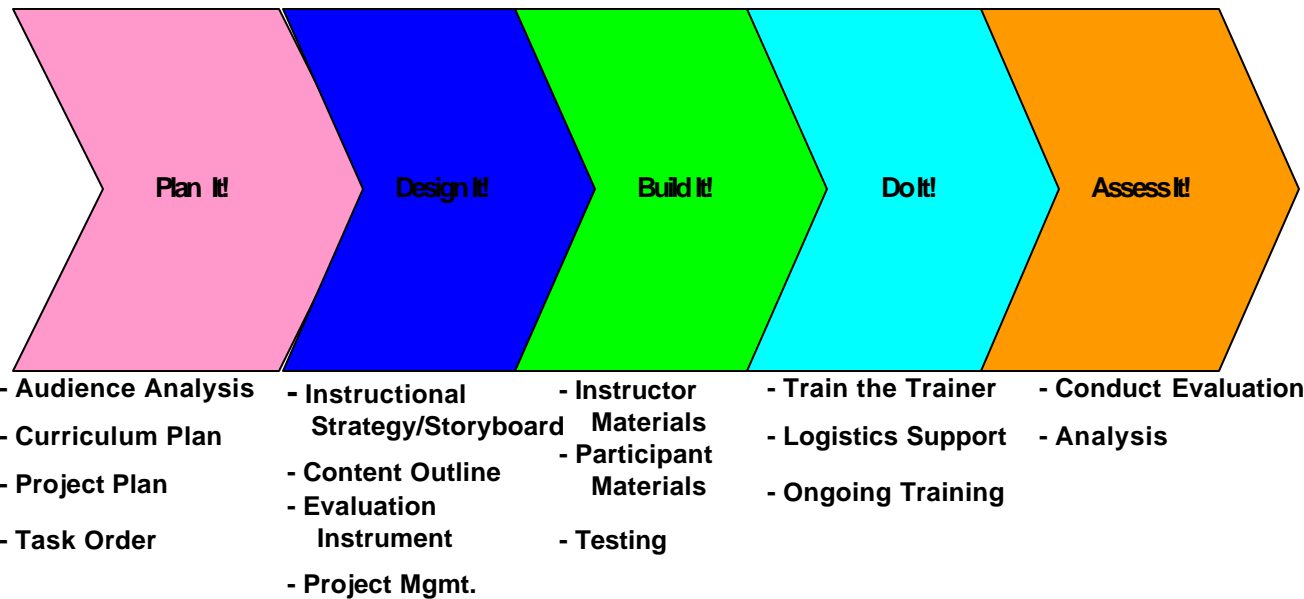
To create a framework and flexible process for developing training within SFA and SFA University. This methodology places rigor around tasks within each phase and provides a consistent framework to follow when developing training. This methodology will help to add value through the reduction of time, effort and money.

5 Phases

1. Plan It! – In order to determine a training need, this phase identifies and contrasts the actual performance “as is” and the desired performance “to be” of specific functions within an organization
2. Design It! - Addresses high-priority performance gaps by drafting development plans in both a Conceptual and Detailed framework to prepare for the development and testing of training
3. Build It! - Produces course material for training that has been reviewed by SMEs and tested with a Pilot group of users. In this phase, it is critical to ensure that the material WORKS
4. Do It! – Involves the conducting and the delivery of training to end users
5. Assess It! – Determines if a course is “effective” to the degree it accomplishes what it sets out to accomplish, and if it is “efficient” to the degree it accomplishes its purpose with the least motion (time, effort, money)

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Training Development Methodology



Segments are a grouping of tasks within each phase, see the next page

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Plan It!

Purpose:

To provide the training development team with an understanding of the user groups, the number of users, and user training requirements. Training developers will use this information to target the training materials to meet the specific needs of the training audience. In addition, this knowledge provides the training team with the information needed to manage the scope of the training effort.

Segments/Tasks/Steps:

Audience Analysis

- Identify Stakeholders (Key Players & Roles)
- Conduct Audience Analysis (Needs Assessment)
- Assess Current Performances (“as is” Business Processes)
- Define “to be” Performance Requirements
- Identify Performance Gaps
- Identify Strategy for Addressing Gaps (e.g. is it a training problem?)

Curriculum Plan

- Identify Learning Objectives
- Identify Content Scope
- Determine Training Delivery Strategy
- Determine Instructional Platform

Project Plan

- Identify Tasks, Deliverables & Roles
- Develop Budget
- Create Macro & Micro Timeline
- Define Check-in Points

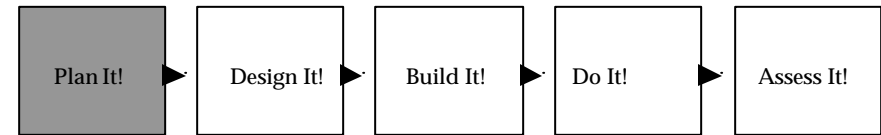
Task Order

- Create and Award Task Order

Project Management

- Control project work throughout each Phase

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Deliverables:

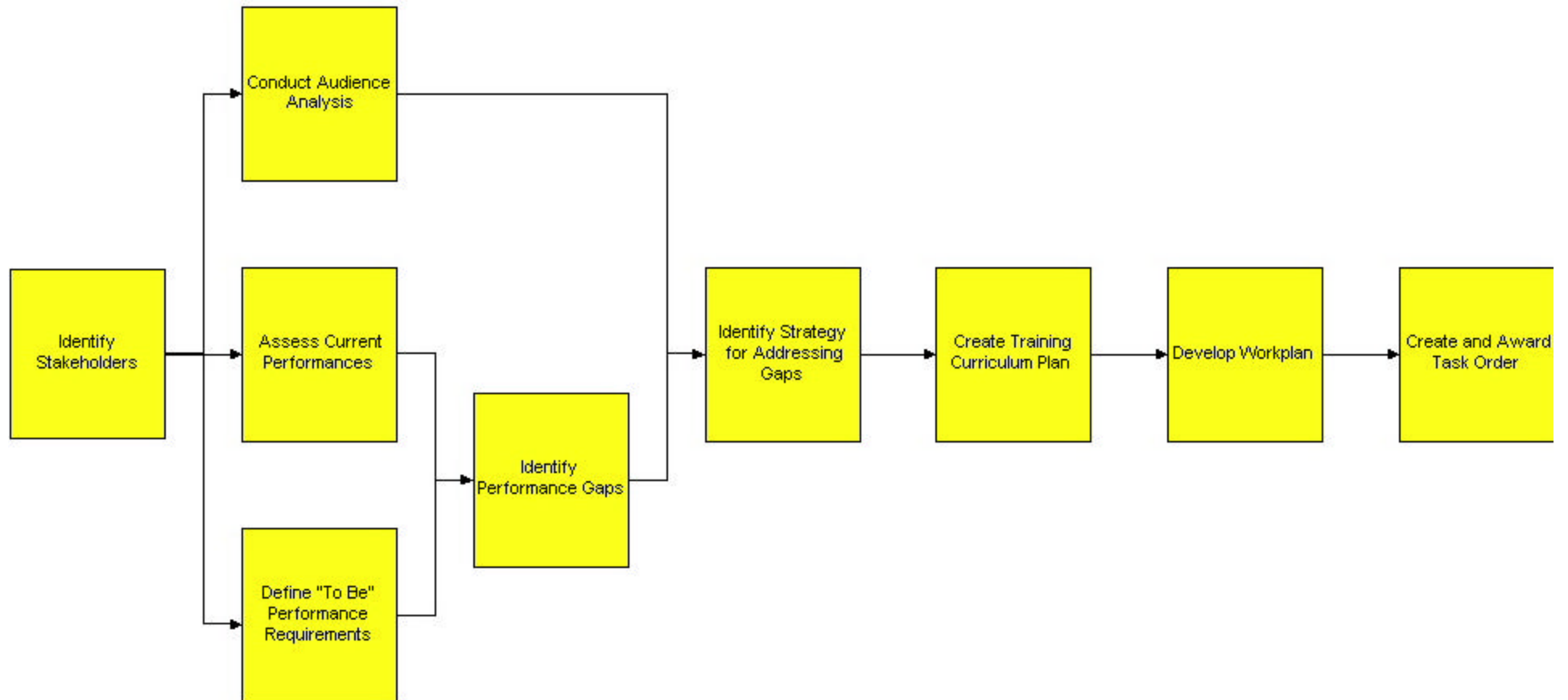
- Role Map
- Audience Analysis
- “As Is” Performance Flow
- “To Be” Performance Flow
- Gap Analysis
- Curriculum Plan
 - Learning Objectives
 - Content Inventory
 - Instructional Approach & Training Delivery Strategy
 - Training Material Descriptions and Samples
 - Training Metrics Descriptions and Samples
- Workplan
 - Tasks
 - Deliverables (Drafts, Final & Sign Off)
 - Macro & Micro Timeline
 - Budget
- Awarded Task Order

Roles:

- Project Sponsor
- Project Lead
- SMEs
- Instructional Designer
- Target Users



Phase 1 - Plan It!



Project Management

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Design It!

Purpose:

The primary focus of the Design It! phase is to provide detailed structure for the training course to be developed; specifically all the necessary information is identified, gathered and structured to allow for the creation of materials during the Build It phase.

Segments/Tasks/Steps:

Instructional Strategy/Storyboard

- Create Activity Designs
 - Identify Activity Type (information delivery, creating deliverable, test, etc)*
 - Map Objectives and Content to Activity*
 - Identify Artifacts/Tools*
 - Feedback Strategy*

Content Outline

- Gather Detailed Content

Evaluation Instrument

- Plan Evaluation/Measurement Tools & Methods

Project Management

- Identify Help/Support Processes Required
- Create Communication Plan
- Confirm Delivery/Technical Architecture
 - Gather Requirements
 - Development & Delivery environments
- Review and Adopt Training Material Standards
- Complete Alpha Usability Test
- Create Implementation Plan

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Deliverables:

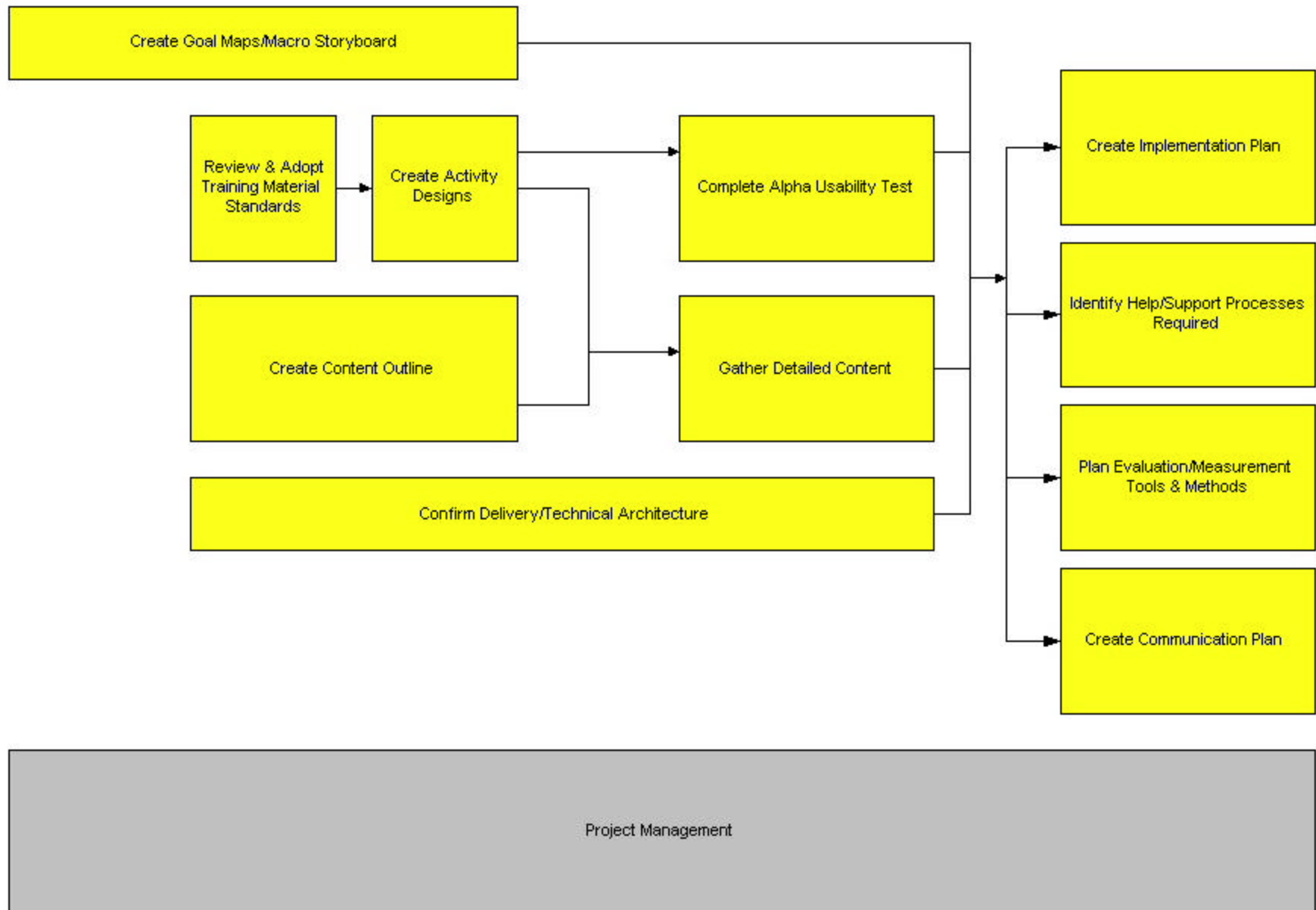
- Goal Map/Macro Storyboard
- Macro Content Outline
- Activity Summary
 - Activity Name
 - Activity Type
 - Learning Objective for Activity
 - Content Scope
 - Artifacts/Tools
 - Examples Needed
 - Feedback Strategy
- Delivery/Technical Architecture Summary
- Templates & Standards for Training Materials
- Usability Test Plan
- Usability Results & Recommendations
- Implementation Plan
 - Implementation Schedule
 - Train the Trainer Design Requirements
 - Logistics
 - Resource & Site Requirements
 - Training Maintenance Plan
- Help/Support Requirements
- Evaluation/Measurement Plan
- Communication Plan

Roles:

- Instructional Designer
- Content Developer
- Project Sponsor
- Project Lead
- SMEs



Phase 2 - Design It!



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Build It! - Classroom

Purpose:

In this phase, the detail course designs are used as input for the actual development of course materials for classroom-based courses.

Segments/Tasks/Steps:

Instructor Materials

- Create Detailed Course content
- Create Instructor material
- Prepare Train the Trainer Course Structure, Content, Material and Logistics

Participant Materials

- Create Detailed Course content
- Create Participant material
- Develop Performance Support materials

Testing

- Plan & Conduct Beta Development Tests
 - Create Beta Usability Test Plan/Schedule users*
 - Conduct Beta Usability Test*
 - Revise Materials based on results from Beta Usability Test*
- Plan & Conduct Pilot Development Tests
 - Create Pilot Test Plan/Schedule users*
 - Conduct Pilot Test*
 - Revise Materials based on results from Pilot Test*

Project Management

- Conduct Ongoing Communications
- Execute Training Logistics
- Build Help/Support Processes
- Package Materials (Printing & Shipping)
- Develop Evaluation/Masurement Tools & Methods

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Deliverables:

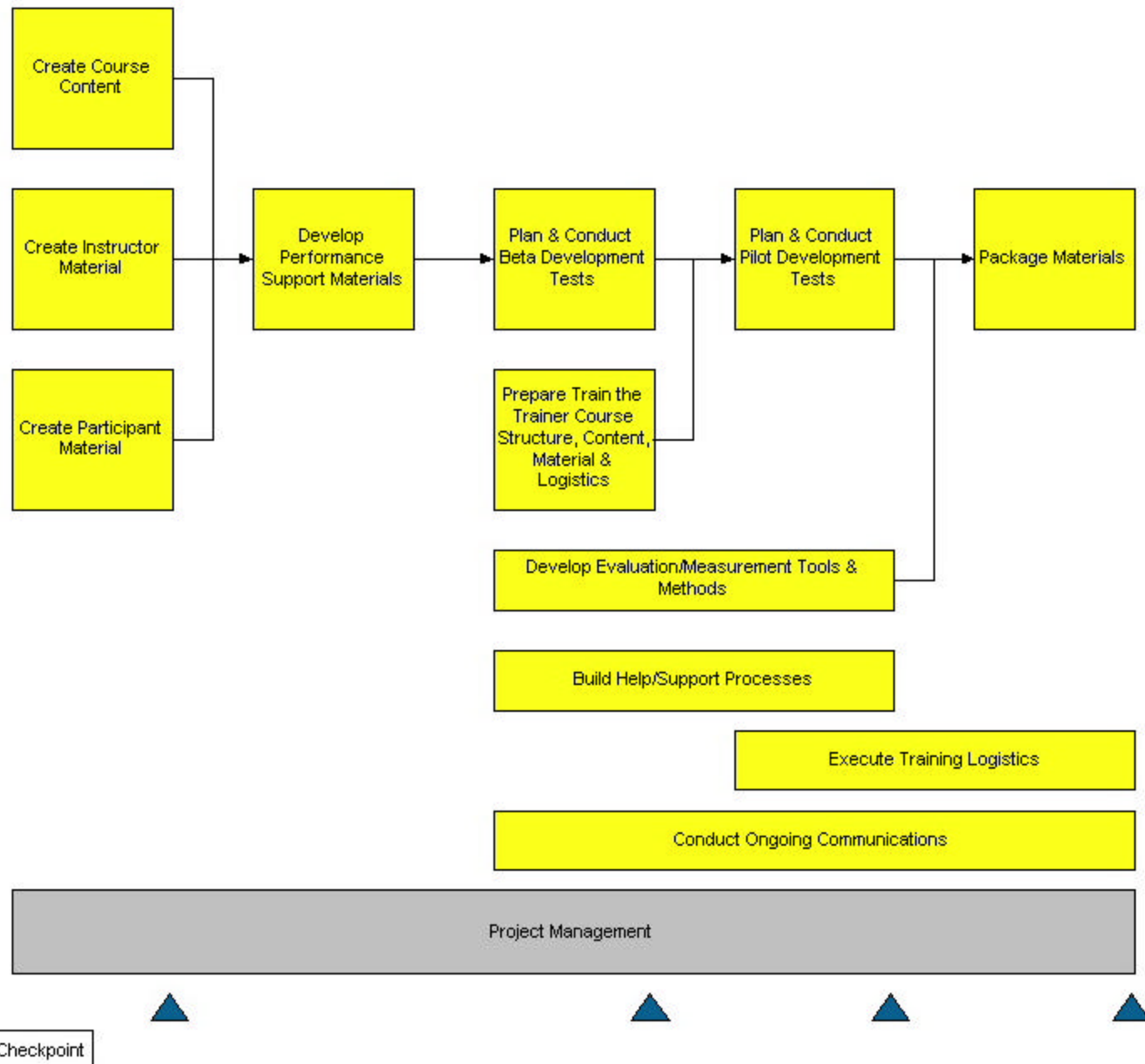
- Training Course Material
 - Course content/Micro Content Outline (presentations, training scenarios, learning activities)
 - Instructor/Facilitator Guide
 - Participant Guide, workbooks, etc
 - Train the Trainer Course Structure, Content and Materials
- Performance Support material (Video/Props/Job Aids)
- Training Logistics
- Help/Support Processes
- Beta Usability Test Plan and Results
- Pilot Test Plan and Results
- Evaluation Measurement Tools & Methods
- Communication Messages

Roles:

- Project Sponsor
- Project Lead
- Instructional Designer
- Content Developer
- Target Users



Phase 3 - Build It! (Classroom)



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Build It! - Online

Purpose:

In this phase, the detail course designs are used as input for the actual development of course materials for online courses.

Segments/Tasks/Steps:

Course Content

- Create Course Content (varies by solution - CBT, Business Simulation, eLearning)
- Create Artifacts & Tools
- Identify Examples
- Develop Feedback
- Coordinate Media Development: Graphics/Video
- Create Training Database
- Develop Performance Support Materials

Testing

- Plan & Conduct Beta Development Tests
 - Create Beta Usability Test Plan/Schedule users*
 - Conduct Beta Usability Test*
 - Revise Materials based on results from Beta Usability Test*
- Plan & Conduct Pilot Development Tests
 - Create Pilot Test Plan/Schedule users*
 - Conduct Pilot Test*
 - Revise Materials based on results from Pilot Test*
- Plan & Conduct Component, Assembly & System Development Tests
 - Create Component, Assembly & System Test Plan/Schedule users*
 - Conduct Component, Assembly & System Test*
 - Revise Materials based on results from Component, Assembly & System Tests*

Project Management

- Conduct Ongoing Communications
- Build Help/Support Processes
- Package Materials
- Develop Evaluation/Masurement Tools & Methods

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Deliverables:

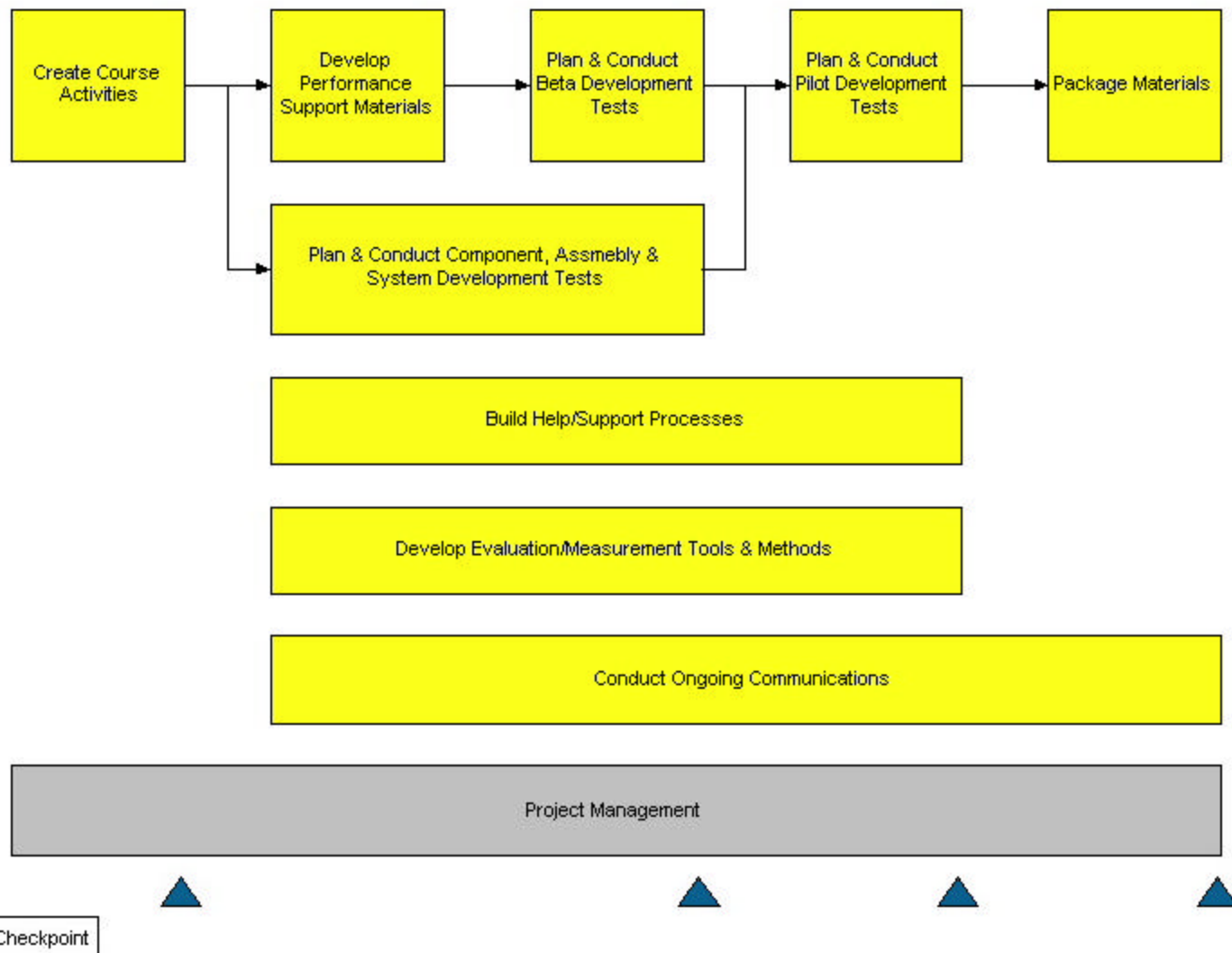
- Completed Course Activities
 - Course Content
 - Artifacts & Tools
 - Examples
 - Feedback
 - Media: Graphics/Video
 - Training Database
- Performance Support material (Video/Props/Job Aids)
- Help/Support Processes
- Beta Usability Test Plan and Results
- Pilot Test Plan and Results
- Evaluation Measurement Tools & Methods
- Communication Messages

Roles:

- Project Sponsor
- Project Lead
- Instructional Designer
- Content Developer
- Programmers
- Usability Users
- Tester
- Graphics Artist
- Media Producer



Phase 3 - Build It! (Online)



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Do It!

Purpose:

The focus of the implementation phase is to prepare for, coordinate and carry out training by ensuring that the location, hardware, instructors, participants, and training materials are available and operational for each training session.

Segments/Tasks/Steps:

Train the Trainer

- Schedule Trainers
- Conduct Train the Trainer (TOT) sessions

Logistics Support

- Execute Logistics Support

Ongoing Training

- Deliver Training (classroom, online)
 - Conduct Course Evaluations*
- Implement Ongoing Support
- Implement Training Maintenance Plan

Project Management

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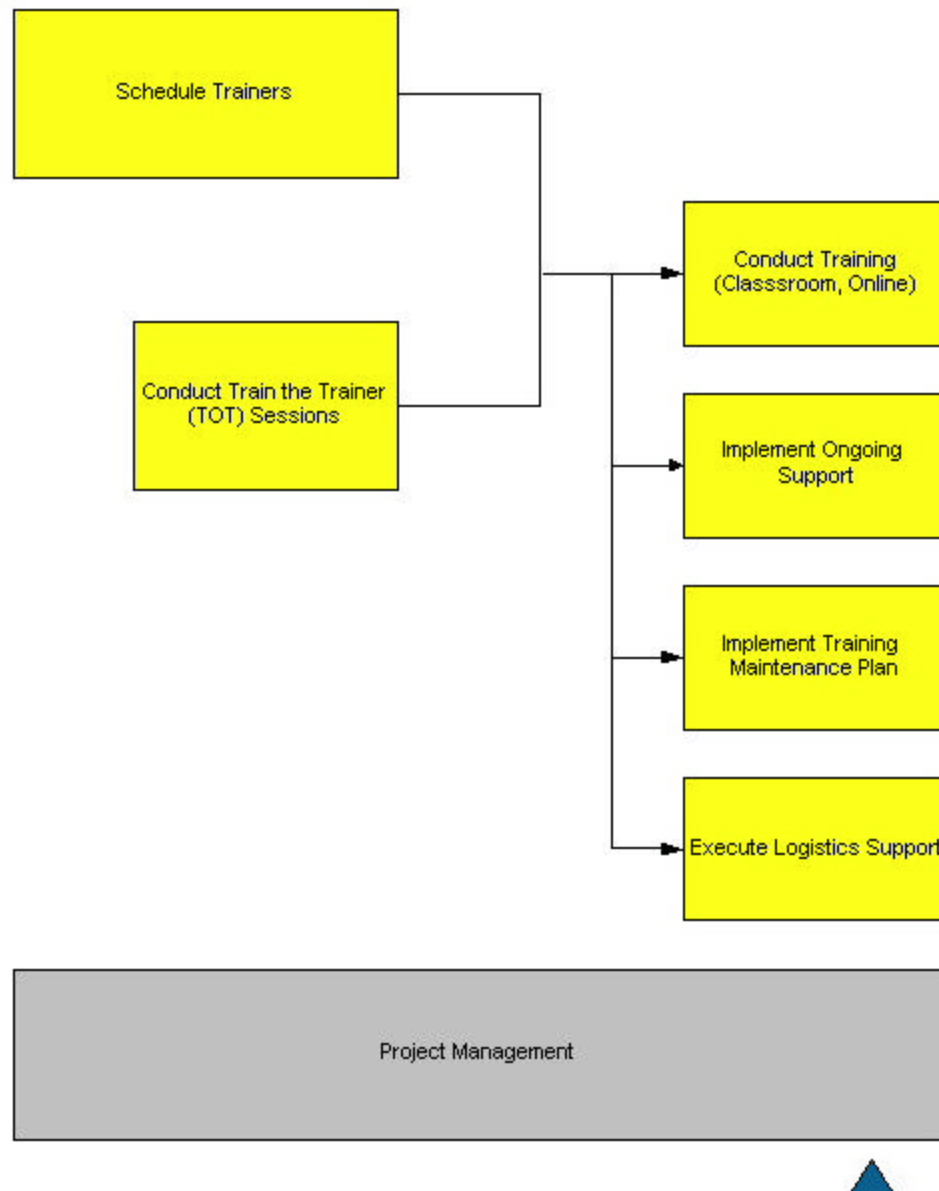


Deliverables:

- Train the Trainer Evaluations/Feedback
- Trainee Evaluations/Feedback
- Communication Messages

Roles:

- Project Sponsor
- Project Lead
- Instructional Designer
- Trainer
- Users



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Assess It!

Purpose:

Perhaps the most critical phase of all. Within the Evaluation phase, we want to determine the effectiveness of our training program. Thorough evaluation will not only help to improve the content and delivery of the current training course, but also processes for developing future training courses.

Segments/Tasks/Steps:

Conduct Evaluation

- Design Effectiveness (did the course achieve what it was supposed to achieve?)
- Delivery Effectiveness (instructors, registration process & ongoing support)
- Economical Effectiveness (Budget...today and future)
- Summarize Evaluation/Measurement Results

Analysis

- Analyze Evaluation/Measurement Results
- Create Plan of Action/Make Recommendations

Project Management

- Conduct Ongoing Communications

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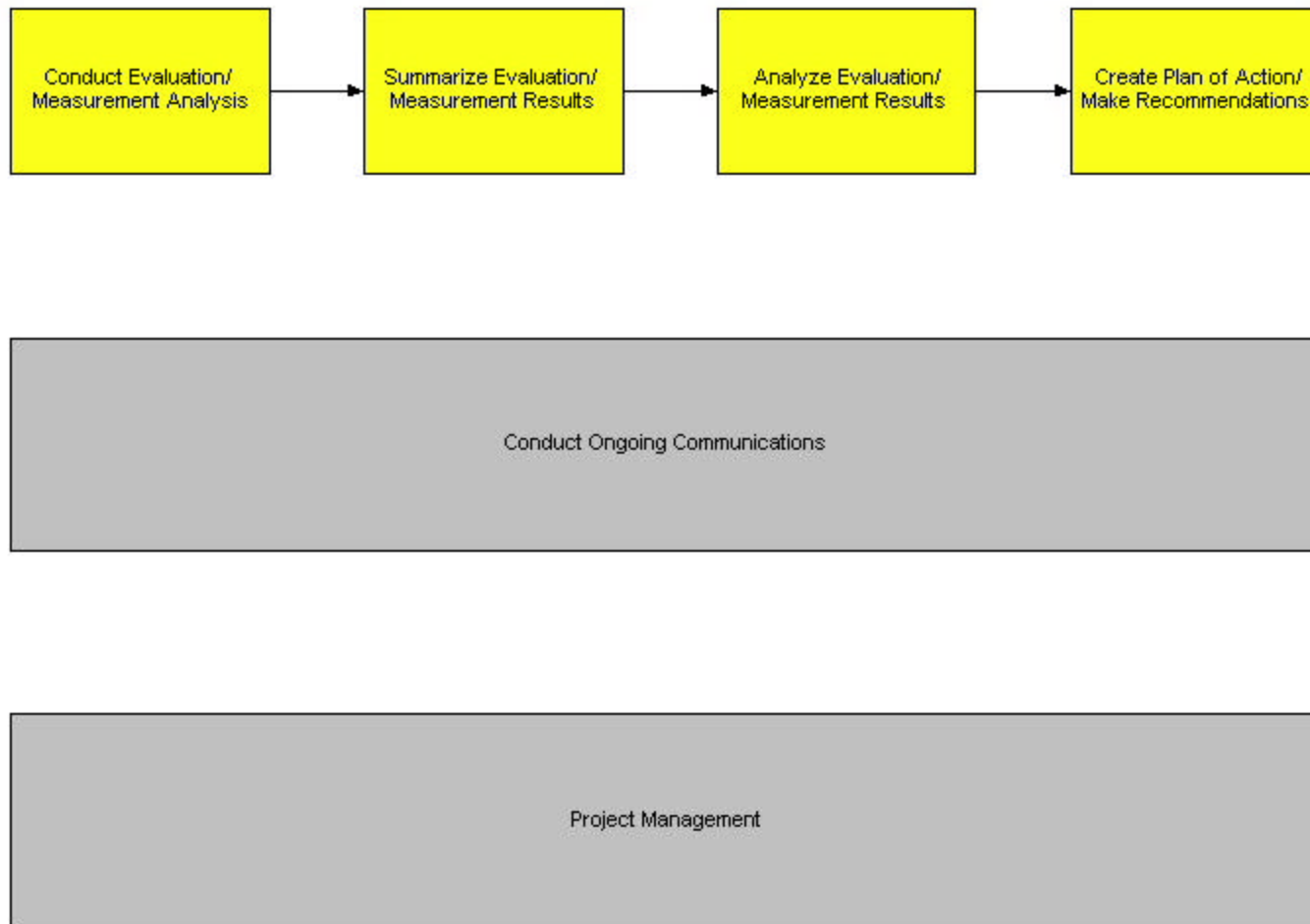


Deliverables:

- Summary of Evaluation/Masurement Results
- Recommendations/Plan of Action
- Communication Messages (Action plan back to trainees)

Roles:

- Project Sponsor
- Project Lead
- Users
- SME



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Project Plan

Components	Step 1	Step 2	Step 3/Ongoing
Lists of tasks	I	D, P	T
Process flows of tasks	I	D, P	T
Deliverables	I	D, P	T
Deliverable flows		I	P, T
Checkpoints	I	D, P	T
Roles	I	D, P	T
Work effort		I, D	P, T
Job Aids		I, D, P	D, P, T
Templates		I, D, P	D, P, T
Examples		I, D, P	D, P, T
Outcomes		I	P, T
Inputs		I	P, T
Entry criteria		I	P, T
Exit criteria		I	P, T

- *I = Identify* (specify the different pieces, such as lists of tasks and deliverables)
- *D = Develop Details* (create detailed descriptions and identify who uses the component when; may not be needed for all components)
- *P = Premiere* (begin to use the information and revise as needed)
- *T = Implement* (ongoing use of the information)

- Overview of the process is created quickly for immediate use
- Detailed information is created and revised over time, as needed
- Continuous process of developing job aids, templates and examples